Guide to Charter School Education Planning and Results Reporting

Requirements for Alberta charter school boards

May 2005

Alberta
EDUCATION

Guide to Charter School Education Planning and Results Reporting

Requirements for Alberta charter school boards

This document provides the requirements for

- Three-year education plans for 2005–2008 (These plans cover the 2005/06, 2006/07 and 2007/08 school years and **are due on June 24, 2005**.)
- Annual education results report for the 2005/06 school year, based on the three-year education plans for 2005 – 2008. Reports are due November 30, 2006.
- Annual education results reports for the 2004/05 school year, based on the three-year education plans for 2004 – 2007 submitted June 30, 2004 (Reports are due on November 30, 2005.)

For more information or for additional copies of this document, contact

Sharon Campbell, Executive Director
Performance Measurement and Reporting
Alberta Education
9th floor, Commerce Place, 10155 – 102 Street
Edmonton, Alberta T5J 4L5

Phone: (780) 427-8217 (in Edmonton)
310-0000 (toll free within Alberta)
Fax: (780) 422-5255 E-mail: <measurement.learning@gov.ab.ca>

Project Manager
Elaine Solez, Senior Manager
Alberta Education, Performance Measurement and Reporting

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Comments?

Send an e-mail to <measurement.learning@gov.ab.ca>.

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May 2005

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What's Changed?

The information in the guide has been reformatted and streamlined for clarity and to reduce duplication. Planning and reporting requirements have been reduced to enhance flexibility and to focus on results.

Charter School Plans and AERRs:	Page
Reporting on measures has been clarified. Reporting comparable provincial results is required only for Provincial Achievement Tests (PATs) and diploma exams; including provincial targets is only required for PATs.	6, 8, 11-12, 34-36
The description of the department's review of plans and reports has been updated, consistent with the Accountability Pillar. **Changes since the March draft are highlighted.**	4, 10
The following changes to charter school planning and reporting requirements start with the November, 2005 AERRs, and also apply to education plans for 2005-08 and November 2006 AERRs: - The required measure for Provincial Achievement Tests (PATs) is cohort results, consistent with the Accountability Pillar; reporting results for writers is optional. - The board selected Review Committee on Outcomes measure is optional (no longer required). - The professional development measure has been restated to better reflect the survey question. - Charter schools are to include a link to their AISI report on their website instead of including highlights of their AISI projects in their AERR. - Charter schools are to include a link to their verified class size report on their website instead of reporting preliminary class sizes in their AERR.	7, 36 7, 36 7, 36 11, 36 11, 36
The following change applies to charter school plans for 2005-08 and the November 2006 AERRs: - Two survey measures in the Accountability Pillar have been replaced by objective measures for charter schools offering high school programs: the annual dropout rate of students aged 14 to 18 and the high school to post-secondary transition rate. Survey measures will be used for charter schools that do not offer high school programs.	7, 36
The following change applies to the November 2006 AERR: - In addition to reporting the most recent five years of data for performance measures, charter schools report a three-year rolling average for the most recent three years of results.	11
What's Been Deleted:	
Provincial priority areas for improvement and strategies and measures for each priority in charter school plans, and reporting on these in charter school AERRs, are no longer required.	
Specific strategies and measures for special student populations and for provincial initiatives are no longer required in charter school plans. Results for special populations are included in overall results.	
Strategies related to the Alberta Commission on Learning (ACOL) and Provincial Initiatives are no longer required in charter school plans.	
Links are no longer included to reduce duplication; all requirements for 2005/06 are listed in the main sections of the document, and the 2004/05 revised reporting requirements are in an Appendix.	
Four appendices from the 2004 Guide have been removed: - Legislative Authority (covered in the background section), - The Definition of Basic Education (available in the Guide to Education online at: <http://www.education.gov.ab.ca/educationguide>), - The list of outcomes and measures developed by the Review Committee on Outcomes (available online at <http://www.education.gov.ab.ca/rco/Finalized.asp>) and - Provincial results and targets for required measures (built into the optional plan format and in Alberta Education Business Plans and Annual Reports).	
The charter school survey instruments were removed from the appendix on surveys (provided to charter schools by e-mail in February 2005 posted on the Internet at: <http://www.learning.gov.ab.ca/educationsystem/Satisfaction/>).	

Section 1

Background

Section 16(2) of the Government Accountability Act requires organizations under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year "in the form and at a time acceptable to the Minister."

Charter schools have a unique purpose in Alberta's public education system, to provide different and innovative approaches for improving student learning, not only for the benefit of their own students, but also for use in other schools.

Charter school plans and reports align with and build on Alberta Education's vision, mission, goals and outcomes for the basic education system. In this way, they help ensure that the entire learning system is focused on key priorities that meet the educational needs of Alberta students. At the same time, charter school plans and reports incorporate local goals, priorities and outcomes that reflect the unique characteristics and circumstances of their communities. In short, they reflect local needs and priorities within the context of a province-wide framework.

Accountability Framework

Accountability in the basic education system is an ongoing cycle that enables continuous improvement and critical reflection. Key components are measuring progress and using results to inform decision-making. For school authorities, the cycle involves:

- developing plans aligned with provincial goals and outcomes;
- incorporating community input;
- identifying and implementing strategies to improve student leaving;
- allocating resources to achieve goals and improve results;
- monitoring progress;
- measuring and assessing results;
- using results to identify priorities and design or adjust strategies; and
- communicating with stakeholders (staff, learners, parents, school councils, the public, and Alberta Education) about charter school plans and results.

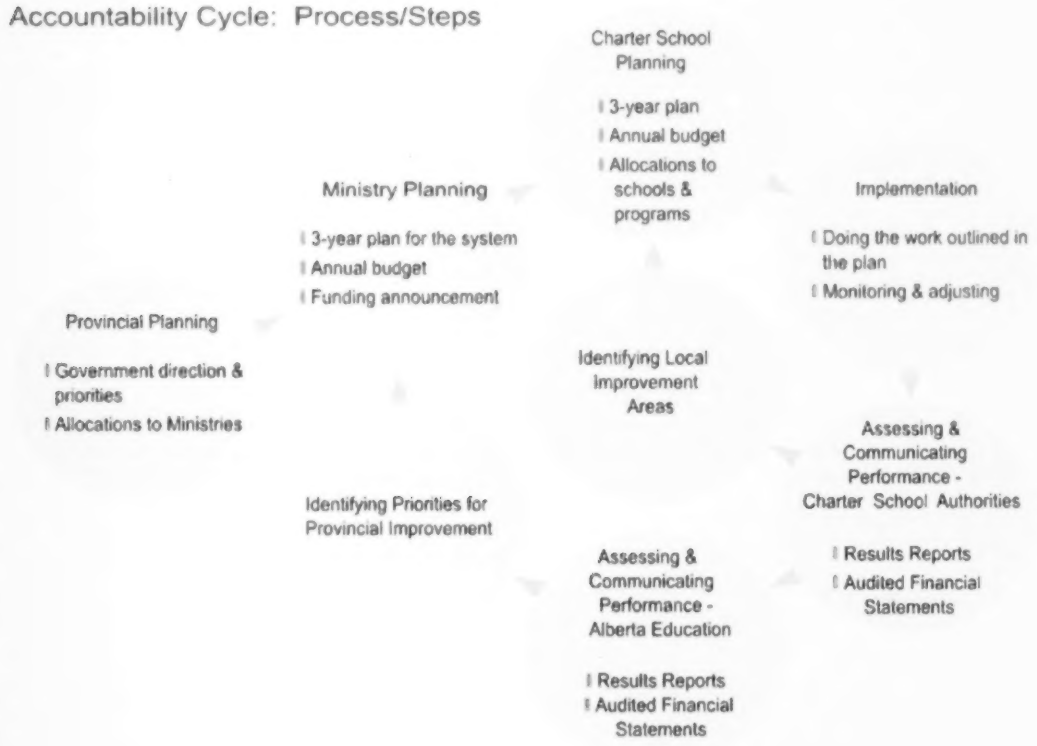
Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework, which is based on three pillars: Flexibility, Accountability and Formulas and has the following fundamental characteristics:

- equitable distribution of funds;
- provision of maximum flexibility to facilitate local decision making; and
- public accountability for the use of resources and the results achieved.

The Accountability Pillar places increased emphasis on achieving outcomes, reporting results and using results for informed decision making for the purpose of improving programs and student results in subsequent years. Building on existing accountability processes and practices, charter schools continue to be accountable for meeting the learning needs of their students and ensuring that provincial policy, legislation and regulations and standards are met. Charter school performance is measured, assessed and reported by comparing current results against past performance and provincial standards on a common set of measures. These measures are listed on page 8.

Figure 1: The accountability framework links each level of planning and fosters continuous improvement throughout the basic education system.



Section 2

Education Plans for Charter Schools

An Overview of the Process

Preparing Education Plans

The education plans prepared by charter schools encompass a three-year cycle, updated each year and aligned with Alberta Education's three-year plan. As one year is completed, another is added. At the same time, strategies and priorities are adjusted in response to the past year's performance results and changes in the operating environment. This approach allows charter schools to be responsive to students and community needs while focusing on continuous improvement and maintaining continuity from year to year.

The ultimate authority for a charter school's three-year education plan rests with the charter board. The charter board provides overall direction for the education plan. In consultation with parents, staff and other stakeholders in their community, the charter school administration develops a planning process that meets the charter school's needs and is responsible for preparing the content of the plan for approval by the charter board.

Updating Education Plans

Charter schools update their three-year education plans each year. Annual updates take the following considerations into account:

- prior years' results
- input from stakeholders such as school councils, students, parents and the school community
- available resources
- Alberta Education's annual three-year business plan and performance results
- feedback from Alberta Education.

Although entirely new plans are prepared infrequently; components such as strategies and targets are updated each year, and components such as the vision, mission and beliefs (foundation statements) should be revisited and refreshed every few years. Such reviews are particularly appropriate when a charter board prepares for charter renewal.

Communicating Education Plans

Three-year education plans are public documents. Charter schools are required to post their plans on their websites, including subsequent amendments or updates. They are also required to use a variety of methods to communicate their plans and their achievements to the broader community. Appropriate tools may include newspaper inserts, brochures, charter school report cards and community meetings.

Submitting Education Plans

Charter schools submit their updated three-year plans to Alberta Education by sending an e-mail to the zone director. The e-mail message should advise that the plan has been posted to the charter school's website and provide the web-link to the plan. If plans are revised after submission, charter schools advise the zone director by e-mail of the changes and that the revised plan has been posted.

Due Dates

Three-year education plans for charter schools are due by May 31 of each year. They must be posted on the charter school's Website by this date, and the department must be notified of this posting (i.e., by e-mail to the zone director).

Note: The due date for the 2005/06 – 2007/08 plan has been extended to June 24, 2005.

Reviewing Education Plans

Alberta Education staff review three-year education plans to assess:

- that performance over time has been taken into account, and the plan includes actions (strategies) to improve results where there are shortfalls in performance, demonstrating the charter school's commitment to improvement,
- alignment with provincial requirements, and
- implications for provincial planning.

The Components and Requirements of Education Plans

[Components are required unless otherwise identified. Components are defined in Appendix 4, page 23]

Education plans for 2005/06 – 2007/08 include the following components:

- A **message** from the board chair (optional).
- An **accountability statement**, worded as follows:
  The Education Plan for (charter school) the three years commencing September 1, (year) was prepared under the direction of the Charter Board in accordance with the responsibilities specified in the *School Act*, the *Government Accountability Act*, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. This Education Plan was developed in the context of the provincial government's business and fiscal plans. The Charter Board is committed to achieving the results laid out in this plan.
- Information on how the plan was or will be communicated to parents and the public. Also include a link to the plan posted on the charter school's Website.
- **Foundation statements** (i.e., vision and mission – required and using the same wording approved by the Minister, principles and beliefs - optional)) that articulate the charter school's values and purpose. These are consistent with the corresponding statements in Alberta Education's business plan.
  - **vision:** describes a possible and desired future state that the charter school strives to achieve; it focuses on student achievement and programs or services that maximize student learning.
  - **mission:** provides a clear, concise description of the charter school's purpose and role.
  - **principles and beliefs:** provide statements of the principles and beliefs that guide the charter school's decision-making.
- A **profile of the charter school** (optional). Profiles include information about the charter school, such as:
  - characteristics of the community and students
  - education programs
  - sites (size, location and other details)
  - planning environment, including emerging trends and issues that affect operations.

- **Charter goals consistent with the charter approved by the Minister and provincial goals, related outcomes, performance measures and targets.** For each goal, include at least one outcome and measure. For each outcome, include at least one strategy. Required provincial goals, outcomes and performance measures are listed on page 8. Include the most recent year of charter school and provincial results for all the required measures. For achievement tests, include charter school and provincial results and targets for each subject and grade, and for overall results (all subjects and grades combined). Also set improvement targets for all required Accountability Pillar measures for which there is more than one year of comparable data, as follows:
  - a target for the first year of the plan when there are two years of results,
  - targets for two years when there are three years of results,
  - targets for all three years of the plan when there are four or more years of results,
- Clearly identify the Accountability Pillar measures (a sub-set of the measures in the charter school plan).
- Additional local goals, outcomes and performance measures (optional). Include goals that address local needs and circumstances, as appropriate. For each local goal, include at least one outcome as well as appropriate strategies and performance measures. Include requirements from charter school evaluations, if applicable.
- Local strategies (at least one strategy for each outcome in the plan), including strategies that address learning needs and achievement of outcomes for all students.
- **Budget highlights.** This section presents highlights from the charter board's budget for the first year of the three-year plan in a way that is easily understood, transparent and meaningful to the public. Budget highlights must provide key financial information about the upcoming school year, focusing on anticipated material changes from the current year. This section may refer to budgeted changes in enrolment, certificated and un-certificated staff, programs, funding, revenues and expenses, annual surpluses or deficits and accumulated surpluses. This section must include:
  - Guiding principles the charter board uses in financial planning.
  - Charts/tables that summarize information from the charter board's budget.
  - A web-link to the charter school's Budget Report Form.
- **Highlights of facility and capital plans.** Include:
  - A brief description of major school renewal projects planned over the next three years (if applicable) and their benefit to students.
  - A brief description of the charter school's capital priorities.
  - A web-link to more detailed information on the charter school's facility and capital plans as submitted to Alberta Infrastructure and Transportation.

- **Communication Plan.** Charter schools have an obligation to share their effective practices and innovative approaches for the benefit of Alberta's education system as a whole. To support accomplishing this priority, charter school education plans must include a Communication Plan that outlines how the school will carry out this obligation.

  The elements of a good communication plan include:

  — objectives,

  — audiences,

  — key messages, and

  — an action plan (specific communication strategies) with timelines.

In addition:

- School councils must have the opportunity to participate in the development of the charter school's three-year education plan, including input on strategies.
- Charter school plans must describe how the school council was involved in the development of the plan.

Note: An optional format is provided in Appendix 6 (pages 26 - 33) that includes all the required elements of the charter school's plan.

Required Goals, Outcomes and Performance Measures

Listed below are all the required goals, outcomes and performance measures (as applicable) for charter school three-year education plans for 2005/06 to 2007/08. **Note:** Measures that are not part of the Accountability Pillar are shaded and do not require targets. Targets for Accountability Pillar measures should focus on improvement. Alberta Education provides data on the required measures. A charter school selected RCO measure is optional.

Charter Goals (section 35 of the School Act)

- Locally determined measures

Goal 1: High Quality Learning Opportunities for All

Outcome: The education system meets the needs of all learners, society and the economy.

- Percentages of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies including fine arts, career, technology, and health and physical education.
- Percentages of teachers, parents and students satisfied with the overall quality of basic education.
- Percentages of teachers, parents and students satisfied with services for students in schools (e.g., academic counseling, career counseling, library services, supports for students with special needs).

Outcome: Schools are safe and caring.

- Percentages of teacher, parent and student agreement that: students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school.

Outcome: Children at risk have their needs addressed through effective programs and supports

- Annual dropout rate of students age 14 to 18 (for high school programs - under development by Alberta Education).
- Percentages of teachers, parents and students who agree that services and supports for children at risk are easy to access and timely (for K-9 charter schools and optional for high school programs).

Goal 2: Excellence in Learner Outcomes

Outcome: Learners demonstrate high standards.

- Percentages of students who achieve the acceptable standard, and the percentages who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests (cohort results for each subject/grade and for overall results – all subjects and grades combined). Results for writers is optional.
- Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations (for high school programs). **(Targets not required for diploma examinations until there are two years of directly comparable results.)**
- Participation rates of Grade 12 students in diploma examination courses (for high school programs).
- Percentages of Grade 12 students eligible for Rutherford scholarships (for high school programs).

Outcome: Learners complete programs (for high school programs).

- Percentages of students who completed high school within three, four and five years of entering Grade10 (under development by Alberta Education).

Outcome: Learners are well prepared for lifelong learning (for high school programs).

- For high school programs: high school to post-secondary transition rate within four and six years of entering Grade 10 (for high school programs under development by Alberta Education). A survey measure of parent, teachers and students for preparation for lifelong learning is under development for K-9 charter schools.

Outcome: Learners are well prepared for employment (for high school programs).

- Percentages of teachers and parents who agree that students are taught attitudes and behaviors that will make them successful at work when they finish school.

Outcome: Learners are well prepared for citizenship.

- Percentages of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.

Goal 3: Highly Responsive and Responsible Charter School

Outcome: Improved results through effective working relationships with partners and stakeholders.

- Percentages of teachers and parents satisfied with parental involvement in decisions about their child's education.

Outcome: The charter school demonstrates leadership and continuous improvement.

- Percentages of teachers and parents indicating that their charter school has improved or stayed the same the last three years.
- Percentages of teachers who agree that professional development opportunities made available through the charter school are focused on priorities and effectively address their ongoing professional development needs.

Section 3

Results Report

An Overview of the Process

Preparing Results Reports

Each year, charter schools measure their performance and report on their progress toward achieving the charter and provincial goals and outcomes of their three-year education plans in their Annual Education Results Report (AERR). The performance measure results are a primary source of information for assessing and reporting on performance, and for determining where improvements are needed.

The annual results report informs stakeholders where the charter school is in relation to where it wants to be in achieving its goals and outcomes. It demonstrates that the charter board is accountable for results and for the wise use of resources to provide quality programs for students and to address areas for improvement. AERRs provide charter schools with the opportunity to summarize their accomplishments, in addition to reporting on performance.

In preparing their results reports, charter schools compile and assess information that pertains to the performance measures identified in their three-year education plans. This information comes from:

- Alberta Education (which provides results for provincially required measures on the Extranet):
  - provincial surveys* of students, parents and teachers.
  - results from provincial achievement tests and diploma examinations.
  - high school completion rates, dropout rates, high school to post-secondary transition rates and Rutherford Scholarship eligibility rates.
- local sources including surveys† used to collect information for optional local performance measures.

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* The Alberta Education surveys used to collect information for education results reports are available in PDF format on the department's Website: <http://www.education.gov.ab.ca/educationsystem/Satisfaction/>.

† To support charter schools in their local efforts to survey stakeholders, Alberta Education prepared a useful handbook, *How to Conduct Satisfaction Surveys: A Practical Guide to Conducting Surveys within Alberta's Education System*. The handbook can be downloaded from the department's Website: <http://www.education.gov.ab.ca/educationsystem/Satisfaction>.

Reporting-Related Communications

Annual education results reports are public documents.
Charter schools are required to post these reports on their Websites. They are also encouraged to use tools such as newspaper inserts, brochures, charter school report cards and community meetings to make the information more broadly accessible.

Reporting information that is summarized for public distribution must include results for all performance measures identified in the charter school's three-year education plan.

A charter school's annual education results report must identify how the report was or will be communicated to the public.

Submitting Results Reports

Charter schools submit their results reports to Alberta Education by sending an e-mail to the zone director. The e-mail message should advise that the report has been posted to the charter school's website.

Due Dates

Charter school's annual education results reports are **due by November 30** of each year, for the previous school year. The reports must be posted on the charter school's website by this date, and the department notified of the posting by email to the zone director.

Reviewing Annual Education Results Reports

Alberta Education staff review charter school's annual education results reports to assess:

- whether current performance has been compared with prior years' results and desired levels of performance (targets),
- whether implications of results for the next update of the charter school plan have been considered, e.g., how shortfalls in performance will be addressed,
- alignment with provincial requirements,
- consistency with the related education plan, and
- implications for the department's planning and priority-setting.

The Components of an Annual Education Results Report for 2005/06 (due November 30, 2006)

[Components are required unless otherwise specified. Components are defined in Appendix 4, page 23.]

Annual education results reports include the following components:

- A **message** from the charter board chair (optional)
- An **accountability statement**, worded as follows:
  The annual education results report for ***(name of charter school)*** for the ***(year)*** school year was prepared under the direction of the Charter Board in accordance with the responsibilities specified in the School Act, the Government Accountability Act, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The Charter Board is committed to using the results in this report, to the best of our abilities, to improve the quality of education for our students. We will use the results to develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.
- Information on how the report was or will be communicated to parents and the public.
- Highlights for the previous school year of the charter school's **accomplishments** (impact of major activities/strategies), including a web-link to the charter school's AISI annual report, and to the charter school's class size report. Include highlights of charter school evaluations, if applicable.
- Report the charter school's **performance measures results** in relation to charter and provincial goals and outcomes (see page 8 for list of required measures for provincial goals), including:
  - the most recent five years of charter school and provincial results; for provincial achievement tests and diploma exams also include provincial results for the same years,
  - the three-year rolling average result (three most recent years), for charter school results; for provincial achievement tests and diploma exams also include the comparable provincial three-year rolling average.
  - the 2005/06 results in relation to charter school and provincial targets for that year; for achievement tests also include provincial targets, and

  - clearly identify the Accountability Pillar measures (a sub-set of the measures in the charter school plan)
  - assessment of results (e.g., improved, no change, declined; met or did not meet target) and factors affecting performance.

- Identify **future challenges**, including areas for improvement and how the charter school will address these.

- **Summary of financial results:**
  - provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus, and capital reserves,
  - include program expenditure information in a table or graph format for the primary audience – parents and other members of the community;
  - indicate where more information on the charter school's sources of school generated funds and their uses can be obtained (e.g., link to the Audited Financial statements, contact person) and that comparative information is available in a provincial report – provide the web-link to the provincial roll up of AFS information: <http://www.education.gov.ab.ca/funding/afs/>.
  - provide a web-link to the charter school's Audited Financial Statement.

- **Capital and facilities projects:** highlight for parents and the public progress on major facilities projects – building renewal funded by Alberta Infrastructure – for the previous school year, as applicable, focusing on benefits to students.

- **Communication Plan:** highlight for parents and the public the results of implementing the communication plan.

Note: A template for reporting results is under development.

Appendix 1

Performance Measurement

Performance measures in school authority plans and results reports provide information on achievement of outcomes on key aspects of the education system. This information is an essential part of accountability that enables the organization to:

- Assess and report on progress, what is working well and what needs improvement.
- Determine priorities for improvement and set improvement targets.
- Make program and budget decisions to maintain good performance and improve performance in areas requiring improvement.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests, surveys and data analysis or through qualitative means, such as observation, interviews and portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change. To be meaningful, measures information is obtained regularly (e.g., annually) and is normally expressed in percentages, ratios or numbers in relation to a total.

Types of Performance Measures

- **Outcome measures:** These provide information on progress toward desired results in key areas – effectiveness of programs, impacts on clients.
- **Intermediate outcome measures:** For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks – toward the desired outcome.

The measures in school authority plans and in results reports focus on outcomes and constitute the core of measures set for assessing and reporting on progress and achievement.

Other types of measures, listed below, are important for managing resources, providing programs and services, and reporting contextual information:

- **Output measures:** information on number of clients served and types of services provided.

- **Process measures:** information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures:** information on resources allocated to programs, such as funding, personnel, and equipment. These measures provide information on cost or numbers of staff involved in providing programs and services.

Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government
- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error-free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provides information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

References:

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the Internet at <http://www.finance.gov.ab.ca/publications/measuring/>. Click on "Other Alberta performance measurement documents."

Alberta Auditor General, *Government Accountability*, February 1997. On the Internet at <http://www.oag.ab.ca/>. Click on "The Reading Room."

Appendix 2

Measuring Performance Through Surveys

Introduction

Gathering feedback and perspectives from stakeholders and beneficiaries of the learning system provides insight on the attitudes and opinions of Albertans on the performance of the learning system. Conducting survey research is an important tool for determining what is working well, where improvement is required and how it can be achieved.

Required Provincial Surveys for Accountability Pillar Measures

The Accountability Pillar consists of a set of measures selected by the Funding Framework Review Committee from the work of the Review Committee on Outcomes (RCO). Some of these are survey measures. To ensure consistency in results for the Accountability Pillar measures across the province and support charter schools in gathering and reporting these results in their Annual Education Results Reports, in 2003/04 Alberta Education implemented annual surveys of students, parents and teachers. Starting in 2004/05 the surveys of students and teachers, administered at schools, were available to complete online, and the teacher survey was expanded to include all teachers. The survey instruments are posted on Alberta Education's website <http://www.education.gov.ab.ca/educationsystem/Satisfaction/>.

Charter School Surveys

Many charter schools routinely survey a variety of client groups. As the new provincial surveys are limited to the survey measures in the Accountability Pillar, and those related to the Commission on Learning recommendations, charter school surveys are expected to continue. These charter school surveys provide a wealth of information that informs management and decision-making. Their continuation also adds to existing longitudinal data and provides more complete parent and student information for charter school boards. Charter schools may choose to include local survey measures in their three-year plans as measures for provincial or local goals and to report these survey results in their AERRs.

Note: Results from charter school surveys cannot be used to report on the Accountability Pillar measures, as the methodologies are different from charter school

to charter school or between charter schools and the province. Only the provincial survey results can be used to report on the Accountability Pillar measures.

Survey Resources

There are many published resources on conducting surveys. To assist charter schools in planning, designing and implementing surveys, a handbook was prepared (under contract to Alberta Learning) and tailored to the type of surveys conducted by school authorities. This document, *How to Conduct Satisfaction Surveys: A Practical Guide to Conducting Surveys within Alberta's Learning System*, is available online at <http://www.education.gov.ab.ca/educationsystem/Satisfaction/>and describes in detail (pages 4-33) the key steps from the following checklist for those involved in conducting satisfaction surveys in Alberta's basic learning system.

Phases of the Survey Process

Planning a Survey

- Develop a description of the satisfaction survey project.
- Define the survey population (students, parents, teachers or citizens).
- Identify key research questions or objectives.
- Establish the project budget and timelines, including determining if the survey will be conducted in-house or contracted to a survey research firm.

Designing the Survey

- Determine the data collection techniques.
- Design the survey tools and instruments (e.g., questionnaire).
- Pre-test the survey tools and instruments.

Conducting the Survey

- Prepare instruments, staff and equipment for survey administration, including selecting a contractor, if used.
- Collect data from respondents.
- Prepare data for analysis.
- Analyze the data.

Communicating Survey Results

- Identify stakeholder groups to report survey results.
- Determine methods to report survey results.
- Prepare survey results report.
- Communicate results to interested individuals or groups.

Implementing Survey Results

- Develop and implement initiatives to address the survey results.
- Gain additional feedback from stakeholders.
- Evaluate the successes and challenges of the survey project.
- Plan future satisfaction measurement issues.

Another useful resource on conducting surveys in the public sector (*Client Satisfaction Surveys*, October 1998) was prepared by the Alberta Auditor General's Office. This document is available on the Internet at <http://www.oag.ab.ca> under "Reading Room."

Statistics and Survey Research Terms

Statistical Inference: Using information from a sample to draw conclusions (inferences) about the population from which the sample was drawn.

Population: Any entire collection of persons or things from which we may collect data. It is the entire group we wish to describe or draw conclusions about.

Sample: A subset of units selected from the larger group (the population). Samples are studied, for reasons of efficiency, to draw valid conclusions about the population.

Census Sample: A sample drawn from a finite population that includes all members of the population.

Random Sample: A subset of a population where every item in the population has the same probability of being in the sample. The primary goal of survey research is to use information collected from a sample to characterize a certain population.

Convenience Sample: A sample where cases are selected, in part or in whole, at the convenience of the researcher (e.g., selecting a sample of students in a school by standing in the hall and interviewing those students who walk by).

Stratified Sample: A sample selected to ensure that key characteristics of the target population (e.g., gender, age, geographic distribution) are adequately represented.

Judgement Sample: (also referred to as "purposive sampling") A sample selected based on the researcher's assessment of their suitability for inclusion in the sample (e.g., selecting persons to a sample who, in the researcher's judgment, are likely to be well informed about the issue under study).

Confidence Interval: A survey result obtained from a random sample of the target population has a confidence interval, expressed as a percentage above and below the obtained result, which indicates the expected variation from the obtained survey result as a consequence of sampling and diversity among respondents. Confidence intervals indicate whether differences in survey results over time (or differences among respondent groups to the same question) are likely the result of sampling variation or represent actual differences.

Standard Deviation: A measure of the spread or dispersion of a set of data. The more widely the values are spread out, the larger the standard deviation.

Survey Instrument (Questionnaire): A set of questions designed and used to gather specific information from survey respondents.

Scales (Measurement type): A basis for ordering or categorizing data to facilitate meaningful comparisons of the aggregate data. Nominal scales are used for categorizing/ordering data having a limited number of possible outcomes that cannot be placed in any order representing the intrinsic properties of the measurements (e.g., male/female). Ordinal scales are used when the relative values of the data being collected are defined in terms of being lesser, equal to or greater than data elements (e.g., strongly agree, agree, disagree, strongly disagree). Interval scales are used when the magnitude of the differences among the observational units is defined in quantitative terms (e.g., amount of money expressed in dollars, weight in pounds, age in years).

Mean: The mean (or "average") of a set of observations is simply their sum, divided by the total number of observations.

Weighted Average: A procedure for combining the mean of two or more groups of different sizes that takes the size of the groups into account when computing the overall average.

Appendix 3

Setting Targets for Performance Measures

Targets are relevant for performance measures at all levels of Alberta's learning system, including charter school and provincial levels of performance. The information provided below relates specifically to charter school target setting.

Definition

A target is a desired level of performance to be attained by a specified time. Targets are a commitment to improvement.

Purpose

Targets support continuous improvement and are used to assess and report achievement in relation to the desired level of performance. Targets indicate the extent of improvement the organization is striving to achieve by a point in time (e.g., by a certain year), and provide a focus for efforts to achieve improvement, including resource allocation, staffing and strategy development and implementation.

Targets are required for the required measures in charter school plans, as data becomes available. Charter schools assess their performance on the required measures against targets they have set.

Principles

1. Targets for performance measures are a valuable part of planning, assessment and reporting.
2. Targets should be meaningful, achievable and challenging.
3. Targets should benefit students and help improve student learning.
4. Target setting should be an interactive process that takes a variety of qualitative and quantitative information into account. Charter school and provincial targets for measures provide a frame of reference for each charter school to use in setting school targets. Targets will vary from charter school to charter school, taking into consideration charter school and community characteristics, past results and other information. Likewise, charter school targets reflect the charter school's context and results, as well as provincial and charter school targets.

5. Targets should be communicated to parents and the public so that Albertans are part of the system-wide efforts to improve education for students.

Target Requirements for Required Measures

1. Targets need to be expressed quantitatively in relation to a whole (e.g., percentages, ratios).
2. Charter school targets need to be set in relation to charter school and provincial targets and results for provincial achievement tests.
3. Charter school targets are required for measures for which there is historical data. Specifically: one-year targets when there are two years of data, two-year targets when there are three years of data, and three-year targets when there are four or more years of data.
4. Targets need to focus on improvement to attain a high level of performance.

Note on phase in of targets for student results on diploma examinations: Diploma examinations are being made directly comparable from year to year by building a common set of questions (anchor items) into the machine-scored portion and equating cut scores. Once the exam is comparable for a course, charter school targets will be required for diploma exam results. See the table on page 23 for implementation of comparable exams and targets for diploma exam results over the next few years. The information on the Diploma Examination Program available online at <http://www.education.gov.ab.ca/k_12/testing/diploma/dip_gib/> will be updated as more information becomes available about diploma exam comparability over time.

Guidelines for Setting Targets

1. Consider a wide variety of information in setting targets: past performance, including trends over time on the measure under consideration as well as related measures (e.g., using prior years' Grade 3 achievement test results to set Grade 6 achievement test results), student or charter school characteristics, resources, both financial and human, that can be applied to achieve improvement, etc.
2. Target setting should be consistent with data collection methods. Data reliability and variability should be considered in target setting.
3. Involve stakeholders in setting targets at each level. School councils and staff should have input in setting school-level targets.

4. When setting targets, prioritize to focus on areas needing improvement, and ensure organizational capacity and resources are in place, including budget, staff and concrete actions of benefit to student learning that will be taken to improve results and achieve the targets.
5. Set targets in relation to other targets, (i.e., measures that impact each other). For example, performance on achievement tests in Grade 3 has implications for performance in Grade 6 three years later.
6. Visual displays, such as trend-line graphs and projections, aid in illustrating results and in setting targets. Trend lines based on at least five years of historical data or rolling three-year averages smooth out year-to-year variability (particularly evident in smaller charter schools), shift the focus from smaller, year-to-year changes to providing information about the longer term direction of the data, including estimates of future results.
7. Professional judgment that takes the local context into account, as well as local and provincial results, is needed for setting targets. In other words, trend data, graphs and projections are an aid to target setting – they do not in themselves determine the targets.

Timelines for Diploma Exam Equating/Target Setting

Alberta Education is working to make the results of diploma examinations directly comparable from year to year. This is being done by building in a common set of test items (anchor items) and adjusting student scores so the diploma examination standards remain constant over time (equating). The process varies in relation to subject-specific challenges.

Provided below is the schedule Alberta Education is using over the next few years for enhancing comparability of the results of diploma examinations and for setting targets for the exams. Charter schools will be required to start setting targets for their examination results when there is one year of results that can be compared to the baseline year results (i.e., two years of equated results). Detailed information will be provided online as it becomes available at <http://www.education.gov.ab.ca/k_12/testing/diploma/dip_gib/>.

School Year	Social Studies 30 Social Studies 33	Pure Mathematics 30 Physics 30 Chemistry 30	English Language Arts 30-1 English Language Arts 30-2 Applied Mathematics 30 Biology 30
2003/04	Baseline established for equating.		
2004/05	• Two years of comparable results available. • Set targets for 2006/07 (1st year of 2006/07 – 2008/09 plan).	Baseline established for equating.	
2005/06	• Three years of comparable results available. • Set targets for 2007/08 and 2008/09 (1st and 2nd years of 2007/08 – 2009/10 plan).	• Two years of comparable results available. • Set one-year target for 2007/08 (1st year of 2007/08 – 2009/10 plan).	Baseline established for equating.
2006/07	• Four years of comparable results available. • Assess achievement of 2006/07 targets. • Confirm targets for 2008/09 (1st year of 2008/09 – 2010/11 plan).	• Three years of comparable results available. • Set targets for 2008/09 and 2009/10 (1st and 2nd year of 2008/09 – 2010/11 plan).	• Two years of comparable results available. • Set target for 2008/09 (1st year of 2008/09 – 2010/11 plan).
2007/08	• Five years of comparable results available. • Assess achievement of 2007/08 targets. • No targets set for 2009/10 – 2011/12 plan (new curriculum is implemented in 2009/10).	• Four years of comparable results available. • Confirm targets for 2008/09 and 2009/10 and set targets for 2010/11 (3rd year of 2008/09 – 2010/11 plan). • Assess achievement of 2007/08 targets.	• Three years of comparable results available. • Set targets for 2009/10 and 2010/11 (1st and 2nd years of 2009/10 – 2010/11 plan).
2008/09	• Six years of comparable results. • Assess achievement of 2008/09 targets. • No targets set for 2010/11 – 2012/13 plan (new curriculum is implemented in 2009/10).	Cycle continues; target setting and assessment of results roll forward a year.	• Four years of comparable results available. • Confirm targets for 2009/10 and 2010/11 and set targets for 2011/12 (3rd year of 2009/10 – 2011/12 plan). • Assess achievement of 2008/09 targets.
2009/10	New curriculum implemented.	Cycle continues; target setting and assessment of results roll forward a year.	Cycle continues; target setting and assessment of results roll forward a year.

Note: Alberta Education will establish baseline examinations for English versions of the exams only (not Français 30 or French versions, due to small populations). Similarly, there will not be an equating process established for Science 30 exams, because of small populations. Charter schools will be advised of any changes to the schedule.

Appendix 4

Planning and Accountability Terms

Accountability: An obligation to answer for assigned responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results.

Baseline: A set of data used as a starting point to measure changes over time using the same methodology.

Continuous Improvement: Using performance results to adjust strategies and practices so that improvement in performance is achieved over time.

Goals: Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims.

Issues: An issue is a condition that may affect the organization's ability to fulfill its mandate or achieve its goals.

Mission Statement: A mission statement is a clear, concise description of a charter school's overall purpose and role. It gives direction to the programs and services that the charter school provides for its students.

Outcomes: Outcomes are measurable statements of what charter schools seek to achieve. In broad terms, they answer the question, "What will this look like when we get to where we want to be?"

Performance Measures: Performance measures provide information on important, quantifiable aspects of the education system. They enable charter schools to assess progress toward achieving goals and outcomes.

Principles and Beliefs: Principles and beliefs guide decision-making and provide a foundation for developing mission, vision and goals.

Profile: A profile is a brief description of the school charter school or school that gives context for the plan. Profiles include characteristics of communities, students, programs and location.

Strategies: Strategies are actions that school charter schools and schools take to achieve goals and desired outcomes that meet the needs of all

their students. They address local circumstances, issues, trends and opportunities.

Targets: Targets show desired levels of performance to be attained by a certain time. Targets are expressed quantitatively.

Trend: A trend shows a direction of data over time, e.g., enrolment growth.

Vision: A vision describes a possible and desired future state for the organization, grounded in reality, which inspires and guides decisions and actions.

Testing Related Terms

Test Equating: Test equating is a procedure that establishes the relationship between scores from two or more tests and places those scores on a common scale so that student test results from different forms can be directly compared. This procedure is usually applied in situations where multiple test forms, similar in content but possibly different in test difficulty, are administered on different test dates. A variety of different statistical procedures can be used to equate tests scores. Equated scores from different forms can be directly compared. Equated scores typically will represent the same level of achievement, no matter which form the student wrote.

Anchor Item: Anchor items are used in the test-equating procedures currently applied by the Learner Assessment Branch. Since all students answer the same set of anchor items, it is possible to determine the relative difficulty of the different forms and adjust student scores appropriately. Sets of anchor items are chosen to represent the curriculum and the range of item difficulties as broadly as possible. In order to preserve the validity of the anchor items, they must be kept secure.

Appendix 5

References

Source material for this guide

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Appendix 6

Requirements and Sample Format for Charter School Plans

The list below and format that starts on page 27 contain the requirements for education plans for 2005/06 – 2007/08. Charter schools may wish to use this information as a checklist, even if they choose to use a format of their own design. All elements are required, unless otherwise identified.

- ❑ **Message from the Charter Board Chair** (optional)
- ❑ **Accountability Statement. Must be phrased as follows:** The (charter school's name) education plan for the three years commencing September 1, (year), was prepared under the direction of the Charter Board in accordance with responsibilities specified in the School Act, the Government Accountability Act, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The priorities outlined in this education plan were developed in the context of the provincial government's business and fiscal plans and Alberta Education's business plan. The Charter Board is committed to achieving the results laid out in this education plan.
- ❑ **Publication** Charter schools must post their education plans on their Websites by May 31st (for this year, extended to June 24, 2005). Indicate how the education plan was or will be communicated to the public.
- ❑ **Foundation Statements** Vision and mission - required, principles and beliefs - optional.
- ❑ **A Profile of the Charter school** (Optional).
- ❑ **Charter and Provincial Goals, Outcomes, Strategies, Performance Measures and Targets** See sample layout starting on the next page that shows the provincial goals, outcomes, performance measures and targets that must be included in the education plan for 2005/06 – 2007/08. See the chart on page 8 for an at-a-glance list of performance measures required by Alberta Education.
- ❑ **For provincial goals and outcomes, identify appropriate local strategies** Additional local outcomes and performance measures (optional).
- ❑ **Budget Highlights**
- ❑ **Highlights of capital and facilities plans**
- ❑ **Communication Plan**

Note: Charter schools that use landscape layouts for education plans that facilitate results reporting are encouraged to continue doing so.

Charter Goal
Outcome:

Performance Measures:	Last Actual	Target 2005/06	Target 2006/07	Target 2007/08
Strategies				

Provincial Goal One: High Quality Learning Opportunities for All
Outcome 1.1: The education system meets the needs of all learners, society and the economy.

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
1.1.1 Teacher, parent, and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.	Charter school			–	–
1.1.2 Teacher, parent and student satisfaction with the overall quality of education in Alberta.	Charter school			–	–
1.1.3 Teacher, parent and student satisfaction with services for children in schools.	Charter school			–	–
Strategies					

Note:

* 2004/05 survey data will be provided to school authorites by the end of May.

Outcome 1.2: Schools are safe and caring.

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
1.2.1 Teacher, parent, and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school.	Charter school			–	–
Strategies:					

Outcome 1.3: Children at risk have their needs addressed through effective programs and supports.

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
1.3.1 Annual dropout rate of high school students (under development for high school programs)	Charter school	NA	–	–	–
1.3.2 Percentages of teachers, parents and students who agree that services and supports for children at risk are easy to access and timely (for K-9 charter schools).				–	–
Strategies:					

Note:

* 2004/05 survey data will be provided to school authorities by the end of May

Provincial Goal Two: Excellence in Learner Outcomes
Outcome 2.1: Learners demonstrate high standards

Performance Measures:			Last Actual 2003/04 A | E**	Target 2005/06 A | E**	Target 2006/07 A | E**	Target 2007/08 A | E**
2.1.1 Percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard and the percentages who achieved the standard of excellence on provincial achievement tests.	Grade 3:					
	Language Arts	C.S.				
		Prov.	82% |15%	84% |18%	84% | 19%	85% | 19%
	Mathematics	C.S.				
		Prov.	82% | 27%	84% |31%	84% | 31%	84% | 31%
	Grade 6:					
	Language Arts	C.S.				
		Prov.	79% | 16%	83% |18%	83% | 19%	83% | 19%
	Mathematics	C.S.				
		Prov.	79% | 21%	80% |21%	81% | 21%	81% | 22%
	Science	C.S.				
		Prov.	81% | 26%	82% |26%	82% | 26%	83% | 27%
	Social Studies	C.S.				
		Prov.	79% | 20%	80% |21%	81% | 22%	81% | 22%
	Grade 9:					
	Language Arts	C.S.				
		Prov.	78% | 12%	81% |15%	81% | 16%	82% | 16%
	Mathematics	C.S.				
		Prov.	66% | 19%	69% | 9%	70% | 20%	71% | 20%
	Science	C.S.				
		Prov.	67% | 12%	– | –	TBD	TBD
	Social Studies	C.S.				
		Prov.	73% | 20%	75% | 21%	76% | 21%	76% | 21%
	Overall	C.S.				
		Prov.	76.6%|18.8%	79.8%|21.1%	TBD	TBD

Strategies:

Notes:

** "A" = Acceptable; "E" = Excellence – the percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

Outcome 2.1: Learners demonstrate high standards (continued)

Performance Measures:			Last Actual 2003/04 A | E**	Target 2005/06 A | E**	Target 2006/07 A | E**	Target 2007/08 A | E**
2.1.2 Percentage of students who achieved the acceptable standard and the percentage who achieved the standard of excellence on diploma examinations.	English 30-1	C.S.		– | –	– | –	– | –
		Prov.	92% | 19%	– | –	– | –	– | –
	English 30-2	C.S.		– | –	– | –	– | –
		Prov.	85% | 07%	– | –	– | –	– | –
	Social Studies 30	C.S.		– | –	– | –	– | –
		Prov.	86% | 24%	– | –	TBD	TBD
	Social Studies 33	C.S.		– | –	– | –	– | –
		Prov.	83% | 15%	– | –	TBD	TBD
	Pure Math 30	C.S.		– | –	– | –	– | –
		Prov.	84% | 32%	– | –	– | –	TBD
	Applied Math 30	C.S.		– | –	– | –	– | –
		Prov.	86% | 14%	– | –	– | –	– | –
	Biology 30	C.S.		– | –	– | –	– | –
		Prov.	82% | 27%	– | –	– | –	– | –
	Chemistry 30	C.S.		– | –	– | –	– | –
		Prov.	86% | 28%	– | –	– | –	TBD
	Physics 30	C.S.		– | –	– | –	– | –
		Prov.	87% | 30%	– | –	– | –	TBD
	Science 30	C.S.		– | –	– | –	– | –
		Prov.	84% | 17%	– | –	– | –	– | –
2.1.3 Participation rates of Grade 12 students in diploma examination courses.	English 30-1	C.S.		– | –	– | –	– | –
		Prov.	56%	– | –	– | –	– | –
	English 30-2	C.S.		– | –	– | –	– | –
		Prov.	25%	– | –	– | –	– | –
	Social Studies 30	C.S.		– | –	– | –	– | –
		Prov.	53%	– | –	– | –	– | –
	Social Studies 33	C.S.		– | –	– | –	– | –
		Prov.	34%	– | –	– | –	– | –
	Pure Math 30	C.S.		– | –	– | –	– | –
		Prov.	44%	– | –	– | –	– | –
	Applied Math 30	C.S.		– | –	– | –	– | –
		Prov.	22%	– | –	– | –	– | –
	Biology 30	C.S.		– | –	– | –	– | –
		Prov.	43%	– | –	– | –	– | –
	Chemistry 30	C.S.		– | –	– | –	– | –
		Prov.	38%	– | –	– | –	– | –
	Physics 30	C.S.		– | –	– | –	– | –
		Prov.	24%	– | –	– | –	– | –
	Science 30	C.S.		– | –	– | –	– | –
		Prov.	8%	– | –	– | –	– | –

Strategies:

Notes:

** "A" = Acceptable; "E" = Excellence – the percentages achieving the acceptable standard in clude the percentages achieving the standard of excellence.

Outcome 2.1: Learners demonstrate high standards (continued)

Performance Measures:		Last Actual 2003-04 *	Target 2005-06	Target 2006-07	Target 2007-08
2.1.4 Percentages of grade 12 students eligible gor the Rutherford Scholarships during high school.	Jurisdiction				
Strategies:					

Outcome 2.2 Learners complete programs.

Performance Measures:		Last Actual	Target 2005/06	Target 2006/07	Target 2007/08
2.2.1 High school completion rate of students within 3, 4 and 5 years of entering Grade 10 (under development for high schools).	Within 3 Yrs: Charter school	NA	–	–	–
	Within 4 Yrs: Charter school	NA	–	–	–
	Within 5 Yrs: Charter school	NA	–	–	–
Strategies:					

Outcome 2.3 Learners are well prepared for lifelong learning.

Performance Measures:		Last Actual	Target 2005/06	Target 200/07	Target 2007/08
2.3.1 High school to post-secondary transition rate within four and six years of entering Grade 10 (under development for high schools).	Within 4 Yrs: Charter school	NA	–	–	–
	Within 6 Yrs: Charter school	NA	–	–	–
2.3.2 Survey measure on teacher, parent and student satisfaction with preparation for lifelong learning (under development for K-9 schools).		NA	–	–	–
Strategies:					

Outcome 2.4 Learners are well prepared for employment.

Performance Measures:		Last Actual 2004/05	Target 2005/06	Target 2006/07	Target 2007/08
2.4.1 Teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school.	Charter school			–	–
Strategies:					

Outcome 2.5 Learners are well prepared for citizenship.

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
2.5.1 Teacher, parent and student agreement that students model the characteristics of active citizenship.	Charter school			–	–
Strategies:					

* 2004/05 survey data will be provided to charter schools by the end of May.

Provincial Goal Three: Highly Responsive and Responsible Charter School
Outcome 3.1 Improved results through effective working relationships with partners and stakeholders.

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
3.1.1 Teacher and parent satisfaction with parental involvement in decisions about their child's education.	Charter school			–	–
Strategies:					

Outcome 3.2 The charter school demontrates leadership and continuous improvement

Performance Measures:		Last Actual 2004/05*	Target 2005/06	Target 2006/07	Target 2007/08
3.2.1 Percentage of teachers and parents who indicate that their charter school has improved or stayed the same in the last three years.	Charter school			–	–
3.2.2 Percentages of teachers who agree that professional development opportunities made available through the school charter school are focused on priorities and effectively address their ongoing professional development needs.	Charter school			–	–
Strategies:					

* 2004/05 survey data will be provided to charter schools by the end of May.

Appendix 7

Revised Reporting Requirements for November 2005 AERR

The 2005 Annual Education Results Report includes the following components:

- A **message** from the charter board chair (optional)
- An **accountability statement**, worded as follows:
  The annual education results report for ***(name of charter school)*** the ***(year)*** school year was prepared under the direction of the Charter Board in accordance with the responsibilities specified in the School Act, the Government Accountability Act, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The Charter Board is committed to using the results in this report, to the best of our abilities, to improve the quality of education for students in our charter school. We will use the results to develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.
- Information on how the report was or will be communicated to parents and the public.
- Highlights for the previous school year of the charter school's **accomplishments** (impact of major activities/strategies), including a web-link to the charter school's AISI annual report, and to the charter school's class size report. Include highlights of charter school evaluations, if applicable.
- Report the charter school's **performance measures results** in relation to their goals and outcomes (see page 36 for list of required measures), including:
  - The most recent five years of charter school results for all measures; for achievement tests and diploma exams also report the provincial results for the same years,
  - The 2004/05 results in relation to charter school targets for that year for all measures; for provincial achievement tests also report the 2004/05 charter school result in relation to the provincial target,

- Clearly identify the Accountability Pillar measures (a sub-set of the measures in the charter school plan), and
- Assessment of results (e.g., improved, no change, declined; met or did not meet target) and factors affecting performance.

- **Summary of Financial results**
  - provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus and capital reserves,
  - include program expenditure information in a table or graph format for the primary audience – parents and other members of the community;
  - indicate where more information on the charter school's sources of school generated funds and their uses can be obtained (e.g., link to the Audited Financial statements, contact person) and that comparative information is available in a provincial report – provide the web-link to the provincial roll up of AFS information: <http://www.education.gov.ab.ca/funding/afs/>.
  - provide a web-link to the charter school's Audited Financial Statement.
- **Capital and Facilities Projects**: highlight, for parents and the public, progress on major facilities projects – building renewal funded by Alberta Infrastructure – for the previous school year (if applicable), focusing on benefits to students.
- Identify **future challenges**, including areas for improvement and how the charter school will address these.
- **Communication Plan:** highlight for parents and the public results of implementing the communication plan.

Note: A template for reporting results is underdevelopment.

Revised Provincial Performance Measures for 2004/05 Charter School AERRs:

Listed below are all the required measures **(revised)** for charter school annual education results reports for November, 2005, as applicable. The measures that are not part of the Accountability Pillar are shaded. Report five years of prior provincial and charter school results and the 2004/05 results in relation to provincial and charter school targets for 2004/05 in the education plan for 2004/05 – 2006/07. If five years are not available, report the available data (e.g., two years of survey results).

Goal 1: High Quality Learning Opportunities for All

Outcome: The learning system meets the needs of all learners, society and the economy.

- Percentage of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies including fine arts, career, technology, health and physical education.
- Percentage of teachers, parents and students satisfied with the overall quality of education in Alberta.
- Percentage of teachers, parents and students satisfied with services for students in charter schools (e.g., academic counseling, career counseling, library services, supports for students with special needs).
- Percentage of teachers, parents and students agreeing that: students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school.

Outcome: All Albertans can participate in quality learning.

- Percentages of teachers, parents and students who agree that services and supports for children at risk are easy to access and timely.

Goal 2: Excellence in Learner Outcomes

Outcome: Learners demonstrate high standards.

- Percentages of students in Grades 3, 6 and 9 **(cohort results)** who achieve the acceptable standard, and the percentage who achieve the standard of excellence on provincial achievement tests.
- Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations (for high school programs).
- Participation rates of Grade 12 students in diploma examination courses (for high school programs).
- Percentages of Grade 12 students eligible for Rutherford Scholarships (for high school programs).

Outcome: Learners complete programs (for high school programs).

- Local high school completion indicator

Outcome: Learners are well prepared for lifelong learning (for high school programs).

- Percentages of teachers and parents satisfied that high school students demonstrate the knowledge, skills and attitudes necessary for lifelong learning

Outcome: Learners are well prepared for employment (for high school programs).

- Percentages of teachers and parents who agree that students are taught attitudes and behaviors that will make them successful at work when they finish school.

Outcome: Learners are well prepared for citizenship.

- Percentages of teachers, parents and students satisfied that students model the characteristics of active citizenship.

Goal 3: Highly Responsive and Responsible Charter School

Outcome: Improved results through effective working relationships with stakeholders.

- Percentages of teachers and parents satisfied with parental involvement in their children's education.

Outcome: The charter school demonstrates leadership and continuous improvement.

- Percentages of teachers and parents surveyed who indicate that their charter school has improved, stayed the same or declined in the last three years.
- Percentages of teachers who agree that professional development opportunities made available through the charter school are focused on priorities and effectively address their ongoing professional development needs.

Notes:

In addition to the outcomes and measures in the above table, reporting on the outcome and measure selected by the charter board from the set of Review Committee on Outcomes (RCO) list of outcomes and measures, is **optional.**